



LIVE UNITED

Roane County United Way

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Community Investment Grant Application Instructions and Check-List
Application Deadline: January 22, 2021

Health, Education, Financial Stability

Roane County United Way’s (RCUW) goal is to help more members of our community achieve: healthier lifestyles; enhanced levels of education and job qualification; and financial stability. **All applications must relate to one of these areas.**

Submit all of the following items, including this checklist.

Application Deadline: January 22, by 5:00 pm

An organization will **NOT** be considered for funding if they do not:

- Meet the qualifications described in *Process Description and Rating Criteria*, <https://unitedwayroane.org/2013/wp-content/uploads/2020/12/2021-CI-Grant-Process-description-criteria.pdf> or
- Submit a full, completed application package as required. If the organization is unable to submit one or more requested documents; the organization should include a statement with explanation as to why it is unable to submit the documents; or
- The application package is received after the application deadline of January 22, 5:00 p.m.

APPLICANTS MUST USE THE FILLABLE APPLICATION FORM, located at <https://unitedwayroane.org/2013/wp-content/uploads/2020/12/2021-Blank-CI-Grant-Application.docx>

All attached files should have the organization name in the file name with title of document! Examples provided below.

Application	<input type="checkbox"/> Submit a signed copy (electronic only) File name should include organization name and Application (Example: Agency XYZ Application)
Attachments	<input type="checkbox"/> State of TN Charitable Letter (Proof of Registration or Exemption)
<i>Include this completed checklist</i> <i>All attached files should have the organization name in the file name with title of document!</i> <i>Examples</i> <i>RCHELPSPEOPLEINNEED</i> <i>FY2015 990</i> <i>RCHELPSPEOPLE Strategic Plan</i> <i>(A shortened organization title is acceptable and/or recognizable acronym such as MECAA or SCHAS)</i>	<input type="checkbox"/> IRS Tax determination letter (tax exempt status of the nonprofit)
	<input type="checkbox"/> Most recent Audit
	<input type="checkbox"/> 3 years of 990’s (if gross receipts >\$50,000) and annual budgets (Include comments on significant items)
	<input type="checkbox"/> 3 years of financial information – Audited Profit and Loss Statement, Balance Sheet and Cash Flow Statement, Annual Budgets (Please make comments on significant items)
	<input type="checkbox"/> 25-word statement describing your organization
	<input type="checkbox"/> List of current Board of Directors
	<input type="checkbox"/> Board Meeting Minutes (3 most recent held meetings)

Submitting Application and attachments: <https://unitedwayroane.org/community-investment-upload-page>